

| Case Study

# Using One Assessment to Empower Growth and Engagement

## ■ Executive Summary

Business and Financial Advising firm, Skoda Minotti wanted to deepen employee engagement and reduce their turnover rate. By implementing The Birkman Method into their talent development processes in 2014, the firm reduced its turnover rate from 11–14% to 6% and has stayed under 8% ever since.

## ■ Challenges

When tasked with finding a tool that could promote self-awareness, drive engagement, and improve retention rates, Laura Rohde, HR Director of Skoda Minotti, consciously chose The Birkman Method. Laura has been a Birkman Consultant for over 10 years and is impressed by the depth and breadth of the tool. She advocated for the firm to use Birkman over their current instrument, DiSC, as some employees had already taken this personality assessment. Firm's leadership appreciated the strategic HR vision offered by Rohde and saw the value in Birkman's targeted, situational reports and agreed to switch tools.

## ■ Implementing Birkman

In early 2015, Birkman assessments were administered company-wide and implemented into team-building strategies. "As employees begin learning more about themselves and others, they became more connected to each other and the company," says Rohde.

"The Birkman Method led to an increase in retention and our ability to leverage individual strengths. An engaged employee is a more productive and happy employee."

After seeing success right away, the HR department began implementing Birkman tools into their hiring process, training, talent development, stress management, career trajectory planning, conflict resolution, client consultations, and even a corporate merger.



## ■ Team Building and Beyond

Towards the end of 2015, the firm started an in-house training and development university with sessions every quarter to develop soft skills, conflict resolution strategies, and leadership effectiveness with Birkman elements implemented in every session. Some sessions even focus strictly on Birkman concepts to help employees better understand

each other's work styles. The sessions have driven self-awareness and engagement and are still a staple in Skoda Minotti's culture.

The program encourages continuous conversations about employees' unique expectations and preferences. To support each employee, the firm provides everyone with reference cards featuring the Birkman Needs of employees. People are encouraged to consider adjusting how they approach others based on that person's needs. This responsibility of approaching someone the way they want to be treated can help to build and deepen relationships as well as increase communication efficiency.

Employees' Birkman colors and symbols are also displayed on Microsoft Outlook and on their office doors/ desk for others to reference when determining the most effective communication approach for each individual.

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Laura Rohde  
**HR Director, Skoda Minotti**

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“You can't walk in our doors without hearing the language of Birkman being used,” says Rohde. “People say it out loud to each other. ‘Because your Birkman is this, I know you need this...’ We also get requests for additional reports to be pulled for specific coaching conversations and team interactions. These requests are further proof that our employees are cognizant of their behavior, how they come across to others and their desire to flex to the needs of other employees.”



## **Innovation Through Professional Development**

During the on-boarding process, every employee takes the Birkman questionnaire and receives a debrief in their first week of work to create awareness about diversity and strengths.

New employees also receive their personalized report along with training that introduces them to Birkman concepts in a personal way.

Learning terms is a crucial early step in the onboarding process because Birkman data is used in daily operations throughout the company. This includes their in-house professional development courses, Birkman Method training, and leadership and management training. Further, Birkman is used extensively throughout their coaching programs and business advising programs. "Speaking a common language with those we coach and/or advise has proven to be helpful in understanding underlying needs of both our internal and external customers," says Rohde.

In their coaching programs, the firm uses Birkman data to pair staff with a performance coach and talent advisor. Performance coaches provide guidance and feedback on the technical aspects of the employee's role. These coaches are more technically experienced and have previously walked the same path that the employee is currently on. Talent advisors provide guidance and feedback on the employee's career aspirations and help them navigate culture. The talent advisors lead by example on interpersonal relationships and team dynamics while developing an employee's leadership strengths. Talent advisors will leverage Birkman reports and tools to help the employee examine workplace situations, develop greater self-awareness, and resolve conflict.

These strategic pairings help to foster mutual respect for the strengths of everyone on their team. The basis of the support system stems from using Birkman data to pair people who naturally have similar communication styles. Skoda Minotti determines that this would help

ensure the team becomes productive out of the gate because they have deeper insight into the people with whom they would be working with. Additionally, similar communication styles would reduce miscommunication and misunderstandings. The in-house university is designed to meet the identified business need by engaging employees throughout their careers at Skoda Minotti.

Due to this process, employees feel a greater sense of camaraderie and understanding earlier in the process to help curb social anxiety. "It supports the company's core value of innovation by being lifelong learners," says Rohde. In trainings, employees are given time for self-reflection on the topic at hand. During this activity, they can document takeaways that they want to implement into their daily work. They are encouraged to share these goals with their performance coach and/or talent advisor to ensure accountability.

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According to one Principal at Skoda Minotti, these meetings radically reduced his workload in coaching by merely providing a common language to speak with those that he coaches. This common language reduced time by avoiding miscommunications and helped him quickly understand how others preferred to work and vice versa. This also made meetings faster and ensured the overall work on a client engagement team was delivered more efficiently.

Along with large coaching sessions, there has also been an improvement on the smaller team level. Through group activities, teams have been able to quickly identify the strengths and possible blind spots within their group. Discussing the differences in individual preferences, causes of stress, and workplace needs have brought unity to teams throughout the firm. These team activities are used when new members start, before a busy season, as a fun team building refresher, or to counteract conflict.

## ■ Retention Starts with Hiring

Skoda Minotti realized that retention starts with smarter hiring strategies, so they also use Birkman data to drive more intentional interview conversations. Candidates for key positions take the Birkman prior to interviews to highlight the strengths they would offer the team. The data is used to understand how their personality would mesh with those they would be working closely with and managing.

The firm can ask more intentional questions upfront about realistic interpersonal dynamics and possible team conflicts within interviews. These conversations help the firm choose the best candidate for the role, team, and culture they'll be joining.

Rohde's number one priority is employee engagement. Making hiring decisions using a candidate's interests is crucial to an employee enjoying their job and staying on board. Reviewing a potential candidate's Birkman scores helps the firm understand if the interests of an applicant would match the work required of the role. It also helps Laura determine if the candidate would be passionate about their job to increase engagement. Birkman interests offer opportunities to pair strengths and passion in people's roles to improve their job satisfaction and motivation.



## ■ Connecting to Clients

Skoda Minotti's success doesn't stop within their walls. They have also been able to take Birkman on the road to clients. As a B2B client focused on professional services, especially business advising and staffing, they see The Birkman Method as a valuable tool to empower their success across client relationships.

Rohde recalls one specific example of using Birkman for placing an HR Director within an existing client leadership team. Due to Skoda Minotti's use of Birkman's Comparative Report during the hiring and on-boarding process, this leader still happily works in the HR Director role over two years later. She even became Birkman Signature Certified after seeing the power of Birkman reports successfully advancing her career.

Birkman has been able to provide value beyond staffing as well. Rohde shares, "Armed with Birkman knowledge, our employees have more awareness of others' communication styles, which helps us better connect with clients. By appreciating and recognizing a range of client's work styles and strengths, our employees are better equipped to connect with them and become their trusted business advisors."

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Laura Rohde

**HR Director, Skoda Minotti**

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## ■ Merging Cultures

When Aurum Wealth Management, a Skoda Minotti firm, faced a merger with Reghetti Moore Wealth Advisors in 2017, they decided to utilize the power of Birkman data to ensure a successful combination of resources and talent.

The firm leveraged Birkman group reports and comparative overviews to empower leaders to understand the strengths of talent within each company and discover how they can best complement each other as a whole. This data also proved beneficial while structuring new teams in the expanding organization. Uncovering the preferences, typical behaviors, and stress triggers of each individual allowed leaders to understand individual strengths and where they would likely flourish within the company. Leadership was also able to account for blind spots by making sure there was personality diversity within each team to promote growth.

Looking at the Birkman Needs of each employee and who meets those needs helped to build a social support system within the teams. The Aurum Wealth Management team and the business have flourished since the merger two years ago through ongoing hiring and growth.

## ■ Birkman at Skoda Minotti Today

Skoda Minotti continues to employ The Birkman Method throughout its culture to create boundless engagement. The firm particularly values the number of application-focused reports and the in-depth data that empowers individuals on every level to understand each other's work styles better to create a culture of appreciation and collaboration. "Every business is a people business. If you want your talent to trust you and your business, then give them a reason to. Show them you are committed to learning about them as a person, help them contribute passionately to the company, and invest in their future. Birkman is a robust enough tool that can help you do all of this in the long run," explains Laura Rohde.

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## About Birkman

Birkman International is a behavioral and occupational assessment company headquartered in Houston, Texas with an extensive global reach. The company began assessing personality through a proprietary methodology founded by innovative organizational psychologist Dr. Roger W. Birkman in 1951.

The Birkman Method remains a preferred instrument to better understand interpersonal dynamics and achieve higher performance through positive psychology. It is used widely in the fields of career coaching, leadership development, human resources management, and organizational design today.